



# TOWN OF KITTERY

Office of the Town Manager

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Nancy Colbert Puff  
Town Manager

December 10, 2014

## **Request for Proposals Interim and Annual Assessing Services**

### **PROJECT SUMMARY:**

The Town of Kittery seeks assistance from qualified consultants to provide property tax assessment services. Services include managing the annual assessment process as required by state law, including but not limited to preparation and timely filing of assessment documents, abatement and supplemental tax assessments yearly appraisals, market analysis, data entry and a regular office presence to serve the public as necessary. The Tax Assessor is an appointed position directly responsible to the Town Manager.

Kittery currently has one individual who fulfills this function, who is expected to retire in early 2015. The assessor is currently supported by a shared development staff clerk who has recently obtained certification as a Maine tax assessor. In addition, consulting services have been employed over the past few years to assist in establishing the annual new growth value. The Town's last revaluation was conducted in 2013 by Vision Appraisal, and the Town has a history of completing revaluations on a ten-year cycle. More detailed information on Kittery's community profile can be found later in this RFP.

Kittery seeks a one-year proposal for Fiscal Year 2016, which may be renewed, subject to negotiation. In addition, a proposal for interim services, from March 1-June 30<sup>th</sup>, is requested. Services provided during the interim period are intended to familiarize the selected consultant with the Department's operation, and evaluate and make recommendations in determining the final scope of work/fee for FY 2016.

All interested firms must submit four (4) copies of their proposals containing complete information as requested in the Proposal Submission Requirements described herein by 11:00 AM local time on Wednesday, December 31, 2014.

Consultants shall be selected on a quality basis, but cost will factor in selection of the proposal deemed to be in the Town's best interest. The Town reserves the right to negotiate a fee with the top-ranked respondent after all proposals have been evaluated. Successful proposers should have a minimum of five (5) years of experience performing similar work, with a proven track record of assisting municipalities with comprehensive assessing services.

Contract award is subject to appropriation. The Town reserves the right to reject any or all proposals.

**SCOPE OF WORK:**

The following scope of work outlined is intended to provide proposers with a minimum guideline of the Town's expectation for assessing services. Proposers are encouraged to tailor their responses using this framework, but may also add to or propose modifications to the work based upon their expertise.

Perform all assessing duties required by Maine law, as expected and typical of Maine assessors in Maine communities, including:

- Establish values for new real and personal property.
- Create and provide all reports required by the Town, the State, and the County.
- Coordinate and cooperate with the tax mapping company and the Planning staff to produce updated and accurate annual tax maps.
- Coordinate with the Town Manager and Treasurer to develop the annual tax commitment.
- Cooperate with staff to process and address any abatements or supplemental taxes.
- Meet with and respond to citizen inquiries and requests for information in a timely manner.
- Provide prompt review and processing of property transfers, splits, and new construction.
- Ability to read and correctly interpret deeds for property splits and utilization of a deed plotter to establish property division for mapping purposes.
- Conduct annual updating of personal property including picking up new accounts, depreciation where appropriate, assisting taxpayers with any reimbursement applications with required information.
- Have thorough knowledge of Maine property tax programs such as: tree growth; open space; farmland exemptions; BETE; BETR; Veterans exemptions; and the ability to assist taxpayers with applications and understanding of the law.
- Review requests for abatement; assist Board of Assessment Review in abatement appeals.
- Keep current with professional training and changes in Maine State law.

Revaluation services are not expected to be part of the base fee for annual assessing services; however, proposers may include information on revaluation experience as part of their response.

**PROPOSAL SUBMISSION REQUIREMENTS:**

Four (4) copies of completed proposals must be submitted to:

Nancy Colbert Puff, Town Manager  
Kittery Town Hall  
200 Rogers Road  
Kittery, ME 03904

All proposals must be received by 11:00 AM on December 31, 2014. Proposals should include:

1. Statement of project understanding
2. Firm background
3. Resumes of key personnel
4. References, including contact name and telephone
5. Detailed work plan & deliverables
6. Proposed Schedule

Cost proposals should be provided in a separately sealed envelope entitled: "Cost Proposal – Assessing Services," with the proposing firm's name plainly visible. All cost proposals should provide a fee that is broken down by task, with personnel assigned and respective hourly rates, and estimated hours on task. Firms are asked to estimate and provide costs for both interim services and for Fiscal Year 2016.

**EVALUATION CRITERIA:**

Proposals will be evaluated on:

Fee proposal  
Relevant experience with similar assignments  
Work references – please submit 3 with complete contact information  
Proposal quality, thoroughness, and clarity  
Project understanding  
Team qualifications and comparable experience

Firms selected to interview will be asked to present their approach and describe applicable similar projects they have completed.

It is the intent of the Town to award the project to the most qualified and responsive individual or firm who is eligible to be appointed as an assessor in Maine, provided that the proposal has been submitted in accordance with the requirements of the RFP. The Town Manager shall be the sole judge of the individual's or firm's qualifications and whether the proposal is in the best interest of the Town.

**CONTRACT REQUIREMENTS:**

The selected consultant will be required to enter into a contract with the Town of Kittery – a sample contract may be provided upon request. A one-year contract is anticipated, with annual renewal options subject to negotiation.

The consultant will be required to indemnify/defend/hold harmless the Town from any claim, and carry the following insurances throughout the contract term. All insurance is to be provided by a company or companies licensed in the State of Maine:

- a. Commercial General Liability on an occurrence (as opposed to claims-made) basis with general aggregate limit applicable per project (ISO CG2503 or equivalent)

- Each occurrence limit \$1,000,000
- General aggregate limit \$2,000,000
- Products/Comp. op. aggregate limit \$2,000,000

An additional insured provision is to apply for the Town, its officers, officials, agents, and employees on a primary, non-contributory basis. Coverage for contractual liability is to be included for the indemnification provisions of this Agreement.

- b. Professional Liability per occurrence \$1,000,000
- c. Auto Liability for owned, hired and non-owned autos with a single limit for each accident of \$1,000,000.
- d. Workers' Compensation insurance to comply with the requirements of Maine statutes, plus employers' liability for:
- Each accident: \$500,000
  - Each employee (disease): \$500,000
  - Policy limit (disease): \$500,000

All policies shall be so written that the Kittery Town Manager will be notified of cancellation or restrictive amendment at least ten (10) days prior to the effective date of such cancellation or amendment. A certificate of insurance from the Consultant's insurance carrier showing at least the coverage and limits of liability specified above and the inception and expiration dates shall be filed with the Town Manager at least seven (7) calendar days before operations are begun.

**Kittery Community Profile (2014):****\$15.52/thousand tax rate**

Total number of real estate accounts:	4,592
Residential Improved:	3,496
Commercial Improved:	175
Mixed Use:	50
Apartments & Condos:	323
Industrial:	35
Commercial/Residential Vacant:	347
Exempt:	155
Open Space (incl. Special Open Space)	11
Taxable Value of Real Estate:	\$1,376,620,800
# of Exemptions/Credits:	
Homesteads:	1,507
Veterans:	363
Blind:	11
Parsonage:	7
Number of personal property accounts:	384
Taxable Value of Personal Property:	\$33,191,300
Number of BETE accounts:	20 approvals
Year of last revaluation:	2013
Latest assessment to sale ratio:	101.91%
Number of TIF districts:	3
Total TIF parcels:	~42
Certified Ratio	100%

RFP Distribution (email only):

1. **Agamenticus Appraisal**  
PO Box 157  
York, ME 03909  
  
[appraisals@agamenticus.com](mailto:appraisals@agamenticus.com)
2. **Atlantic Valuation Services**  
Robert A. Konczal, CMA  
210 Beech Ridge Road  
Scarborough, ME 04074  
  
[robert\\_konczal@yahoo.com](mailto:robert_konczal@yahoo.com)
3. **J.F. Ryan Associates, Inc.**  
3 Longview LN  
Newbury, MA 01951-1736  
  
[jfryan@comcast.net](mailto:jfryan@comcast.net)
4. **John O'Donnell & Associates**  
632 Bald Hill Rd  
New Gloucester, ME 04260  
  
[john@jeodonnell.com](mailto:john@jeodonnell.com)
5. **KRT Appraisal**  
191 Merrimack Street, Suite 607  
Haverhill, MA 01830  
  
[marketing@krtappraisal.com](mailto:marketing@krtappraisal.com)
6. **Municipal Resources Inc.**  
295 N Main St  
Salem, NH 03079  
  
[jlessard@municipalresources.com](mailto:jlessard@municipalresources.com); [djutton@mrigov.com](mailto:djutton@mrigov.com)
7. **Parker Appraisal Company**  
PO Box 6104  
Falmouth, ME 04105  
  
[agbg@aol.com](mailto:agbg@aol.com)

8. **Sandra McCallum**  
PO Box 1420  
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[sandymc@maine.rr.com](mailto:sandymc@maine.rr.com)
9. **Shirley Bartlett**  
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